Cayuse Role Management

-SPO BAASICS-

October 12, 2020

Presented by Kassie Obelleiro

Sponsored Programs Training Officer

Learning Objectives

01 Role Managers

02 Critical Roles

03 Identify Roles

04 Establish Roles

Role Managers

Know the responsibilities and functions of Role Managers

Critical Roles

Know the critical Research Contact Roles in Cayuse

Identify Roles

Be able to identify Research Contact Role Assignments

Establish Roles

Be able to establish Research Contact Roles

01

Cayuse Overview

Cayuse SP and 424 Functions

Cayuse

Cayuse SP

Internal routing and approval

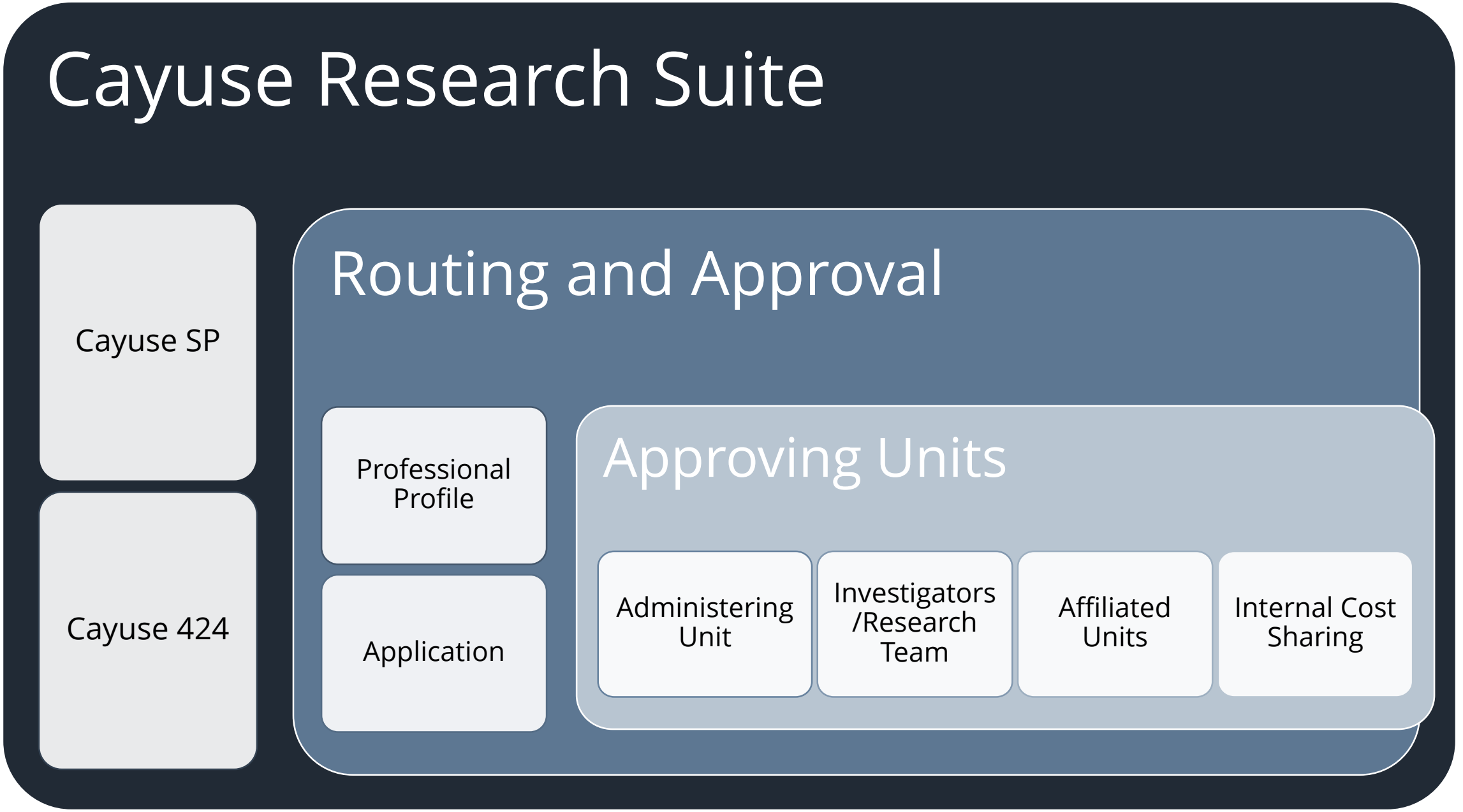
Cayuse 424

Application submission to most **Federal** sponsors

System Administration

Unit Roles list and System Administration applications

cayuse Research Suite


Cayuse Research Suite
Cayuse SP
Cayuse 424
Routing and Approval
Professional Profile
Application
Approving Units
Administering Unit
Investigators /Research Team
Affiliated Units
Internal Cost Sharing

Cayuse Roles

Professional Profiles

- Personnel, Salary and Appointment Information

Research Contacts

- Administrative Permissions for Administering Units

Investigators/Research Team

- IPF-Specific Access

02

Research Contact Roles

Administrative roles for administering units of proposals, awards and subawards

Role Managers

Unit Heads complete a Role Delegation Authorization Form and request establishment of Role Managers for their units.

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01

Coordinate with Unit Head

Accurate and appropriate role delegation

02

Grant Access

Establish Research Contact roles

03

Unit Subject Matter Expert

Provide guidance to unit investigators and staff

Critical Research Contact Roles

IPF Approver

Approves proposals/IPFs administered by their unit and/or involving investigators from their unit

The Unit Head or their delegate

Pre-Award Spending Approver

Endorses Advance Accounts requests for proposals submitted through their unit (as administering unit)

The Unit head or their delegate

Role Manager

Establishes Research Contact roles for their administering unit

Usually contract and grant administrators and other staff roles

Other Research Contact Roles

01

Proposal Data Access
May view proposal/IPF details in an administering unit

02

Award Data Access
May view award details in an administering unit

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Activity 1: Who Can Help?

Read the scenario and select the Research Contact Role(s) that can provide assistance.

1. A PI would like to know the status of their proposal that a department admin submitted on their behalf in Cayuse SP. The department admin is out of the office. What Research Contact Role allow the needed access to check the status of the proposal/IPF?

   A. Role Manager

   B. Proposal Data Access

   C. Award Data Access

Activity 1: Who Can Help?

Read the scenarios and select the Research Contact Role(s) that can provide assistance.

2. A PI would like to know the status of an award they received from NIH and that was submitted to SPO via email. What Research Contact Roles allow the needed access to check the status of the award?

   A. Role Manager

   B. Proposal Data Access

   C. Award Data Access

Activity 1: Who Can Help?

Read the scenario and select the Research Contact Role(s) that can provide assistance.

3. A new person is hired as a contract and grant admin in your unit. Who can give them the necessary VIEW access for both Proposals and Awards in you admin unit?

   A. Role Manager

   B. Proposal Data Access

   C. Award Data Access

03 Research Contact Role Management

Keeping Research Contact Roles current will help mitigate Internal Processing Form (IPF) routing and approval.

Maintain Research Contact Roles

Role Managers should work with their unit head and others in their units, as appropriate, to ensure the Research Contact Roles for their unit are kept accurate and current.

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01

Current-ness

- Ensure the Research Contact Roles are current

02

Role Manager Changes

- Unit Heads request **new** Role Managers from SPO

03

Unit Head Changes

- Unit Head submits Role Delegation Authorization form to SPO
- Role Manager removes historical IPF Approver and add new unit head

Identifying Research Contacts

Access Research Contacts

From the Cayuse Research Suite:
- Select “Research Contacts”

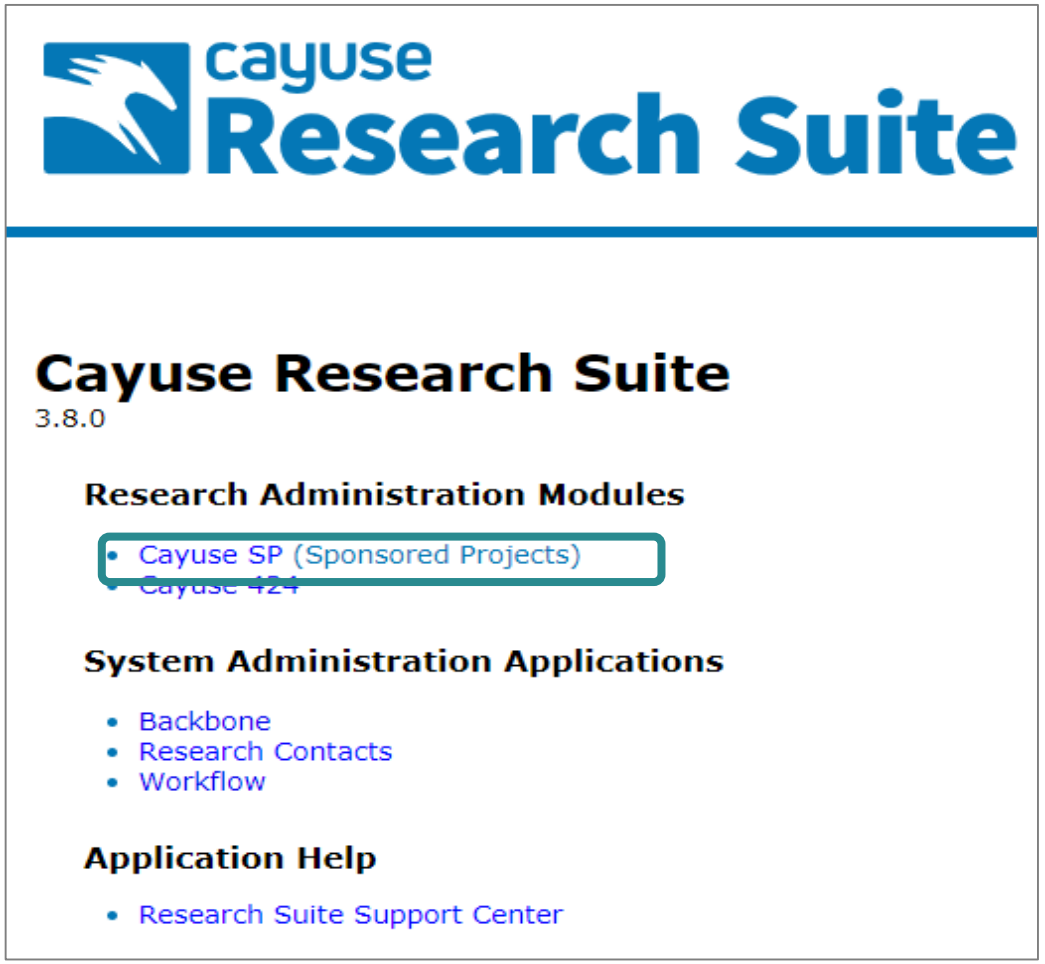
From Cayuse SP:
- Select “More”
- Select “View Roles By Unit”

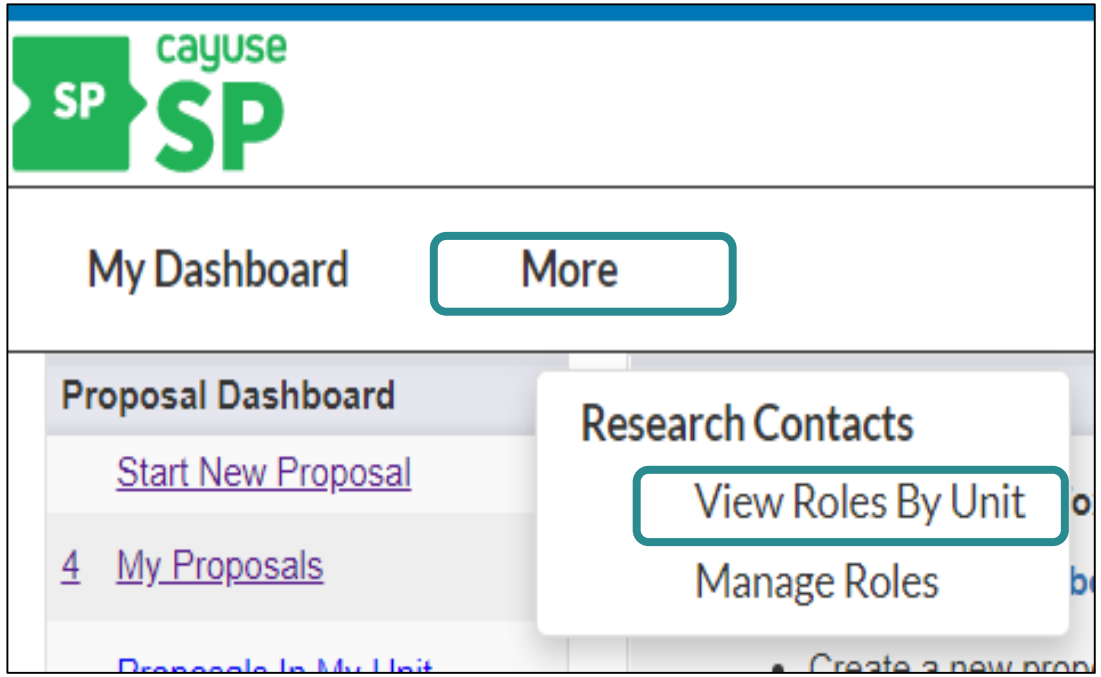
Find the Administrative Unit

- Select “list” or select/click in the text field
- Find and select the unit

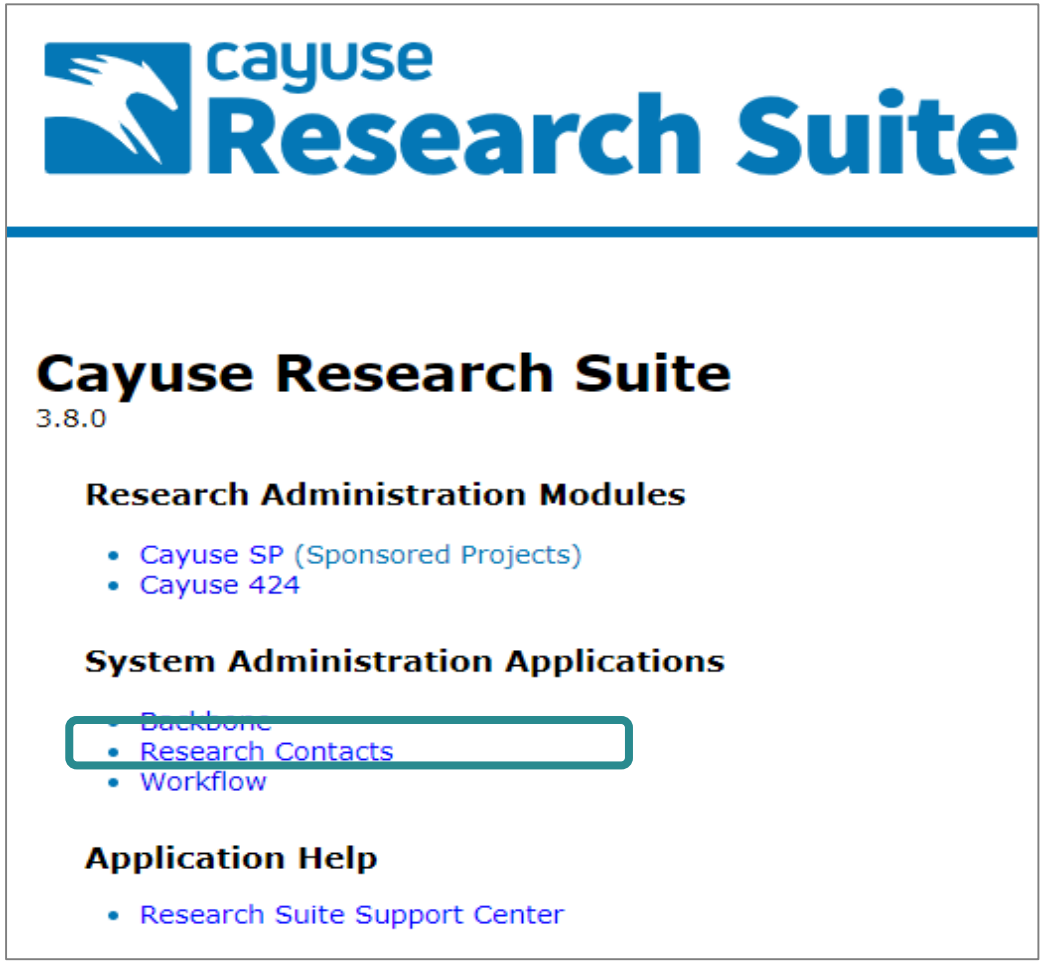
The assigned roles will display.

Access from Cayuse SP

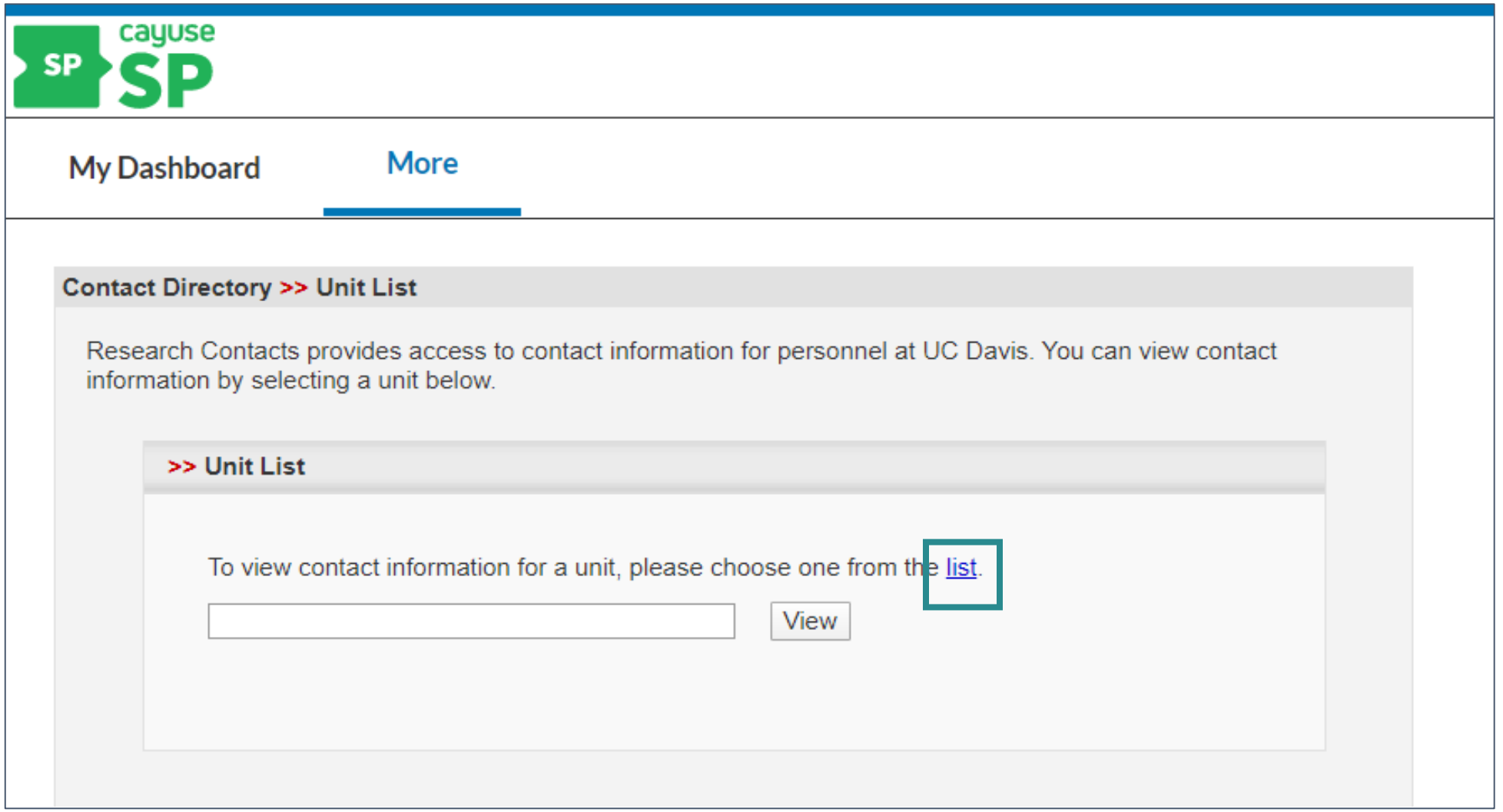




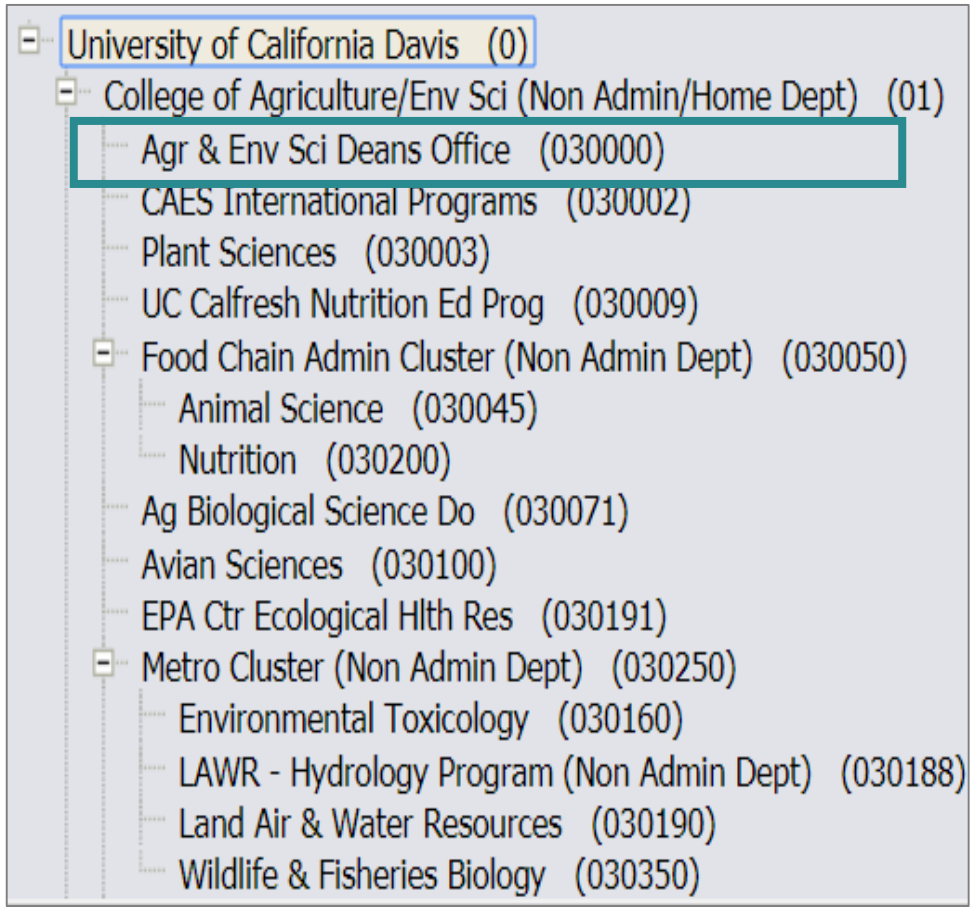
Access from Cayuse Research Suite

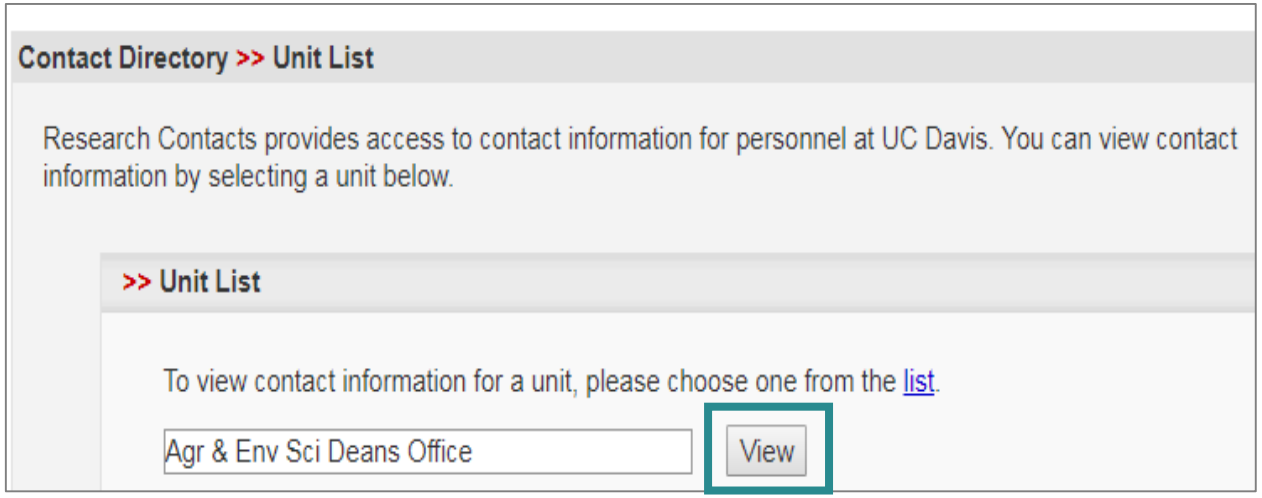


Find the Unit



Find the Unit





View Research Contact Roles

Contact Directory >> Department Contacts

>> Agr & Env Sci Deans Office

Administrator	Title	Email	Phone	Fax	Campus Box	Roles
Abrenilla, Rachel	Analyst III, Spvr	cayuseuat@ou.ad3.ucdavis.edu	530-754-0275		1850 Research Park Drive Suite 300 Davis CA 95618-6513	Award Data Access, Proposal Data Access
Austin, Bernadette	Associate Director	cayuseuat@ou.ad3.ucdavis.edu	(530) 752-3007		1 Shields Ave. Davis CA 95618-6153	Award Data Access, Proposal Data Access
Barbier, Tara	Financial Analyst	cayuseuat@ou.ad3.ucdavis.edu	530-752-1456	707-875-2009	1850 Research Park Drive Suite 300 Davis CA 95618-6513	Award Data Access, Proposal Data Access
Boulanger, Joyce	Financial Officer	cayuseuat@ou.ad3.ucdavis.edu	530-754-7197		1850 Research Park Drive Suite 300 Davis CA 95618-6513	Award Data Access, Proposal Data Access
Crothers, Laura	Proposal Coordinator/Senior Writer	cayuseuat@ou.ad3.ucdavis.edu	+1 530 754 8549		141 Robbins Hall Davis CA 95616	Proposal Data Access, Award Data Access

Activity 2: Identify Role Assignments

Find role assignments for Sponsored Programs

01 Select “Pause” when you are ready to begin

02 Login to https://ucdavis-uat.cayuse424.com
- Username: amieadmin
- Password: training

03 Find “OVCR – Sponsored Programs” and note one person listed in each of the following roles.
- Role Manager: _____
- IPF Approver: _____
- Pre-Award Spending Approver” _____

04 Select “Play” when have the answers

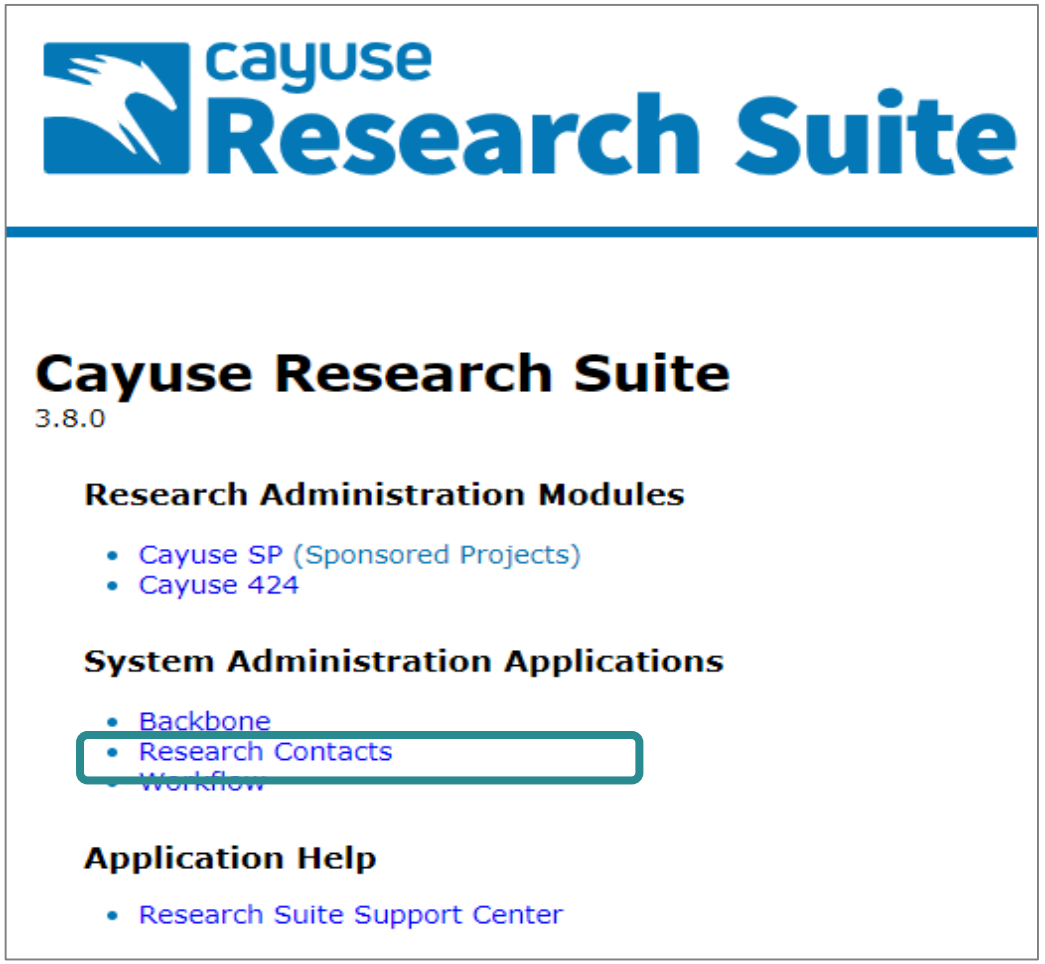
Activity 2: Identify Role Assignments

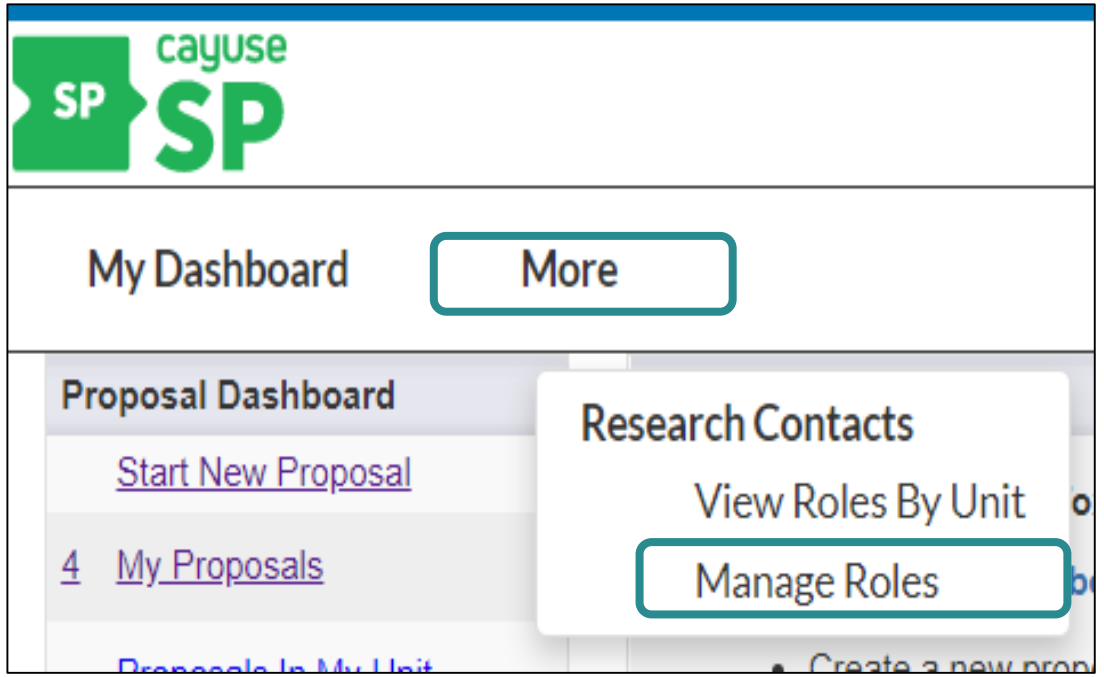
Contact Directory >> Department Contacts

>> OVCR - Sponsored Programs

Administrator	Title	Email	Phone	Fax	Campus Box	Roles
Admin, Amie					Davis CA 95618-6153	Role Manager, Proposal Data Access, IPF Approver
Apple, Charlie		capple@ucdavis.edu	530-555-5555		123 Gallagher Hall Davis CA 95618-6153	IPF Approver, Pre-Award Spending Approver
Duperron, Terrence	C&G Analyst	cayuseuat@ou.ad3.ucdavis.edu	530-752-4794	530-754-7894	1850 Research Park Drive Suite 300 Davis CA 95618-6513	IPF Approver
Friudenberg, Laura	Admin Assistant Iii	cayuseuat@ou.ad3.ucdavis.edu	916-734-2923		1850 Research Park Drive Suite 300 Davis CA 95618-6513	Proposal Data Access
Help, OR	Default IPF Approver Misroute Notification	cayuseuat@ou.ad3.ucdavis.edu			1 Shields Ave Davis CA 95616	IPF Approver
Obelleiro, Kassie	Training Officer	cayuseuat@ou.ad3.ucdavis.edu	530-754-7958		1850 Research Park Drive Suite 300 Davis CA 95618-6513	Proposal Data Access, Role Manager
Parks, Christine	Program Coordinator	cayuseuat@ou.ad3.ucdavis.edu	530-752-8512		1850 Research Park Drive Suite 300 Davis CA 95618-6513	Proposal Data Access

Managing Roles





Managing Research Contact Roles

Select or Add a Contact

If the person is not listed in the Contacts drop-down:

- Select “Add Contact”
- Find and select the user’s name
- Select “Add Contact”

Add or Delete Roles

To add a role:

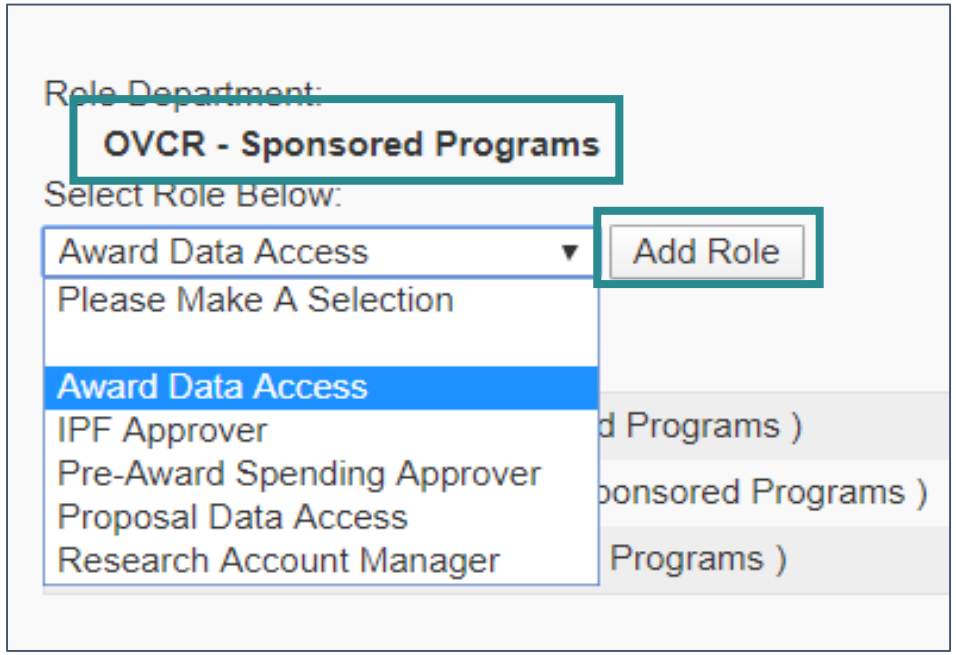
- Select the department/unit of the applicable role
- Select the role to add from the Role drop-down
- Select “Add Role”

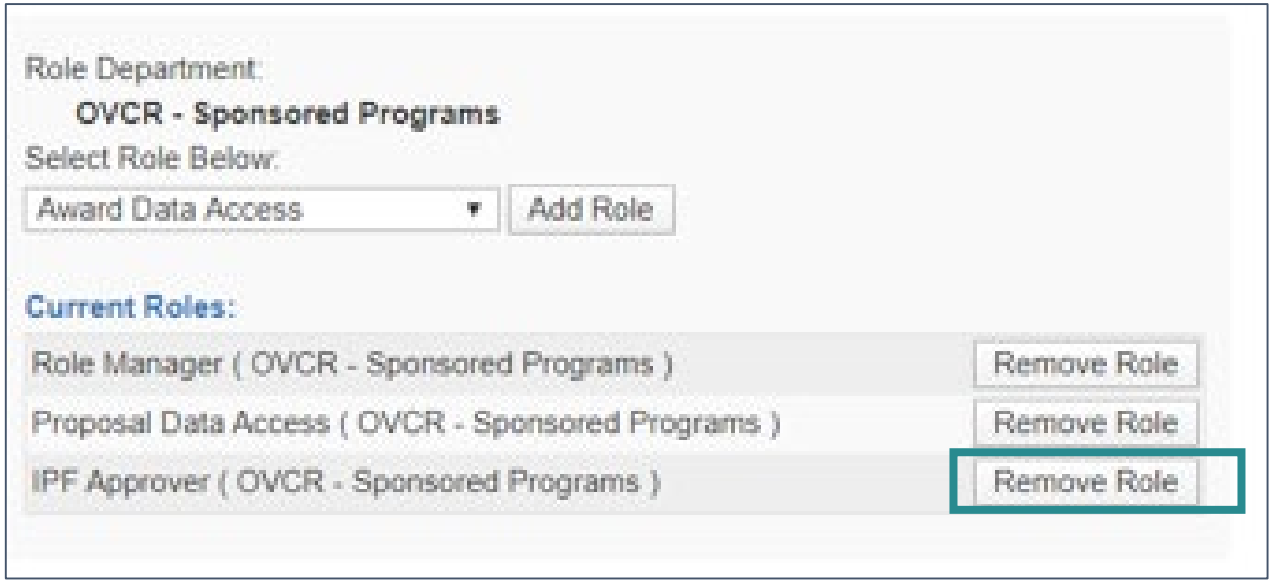
To delete a role:

- Select “Remove Role” next the applicable role

View detailed instructions in the Handbook for Role Managers.

Adding and Deleting Roles





Activity 3: Establish a Role

Logged-in as Amie Admin, assign yourself as a Role Manager for “OVCR – Sponsored Programs”.

01

Login to:

https://ucdavis-uat.cayuse424.com

- Username: amieadmin
- Password: training

02

Access Research Contacts

Select “Manage Roles”

03

Assign a Role

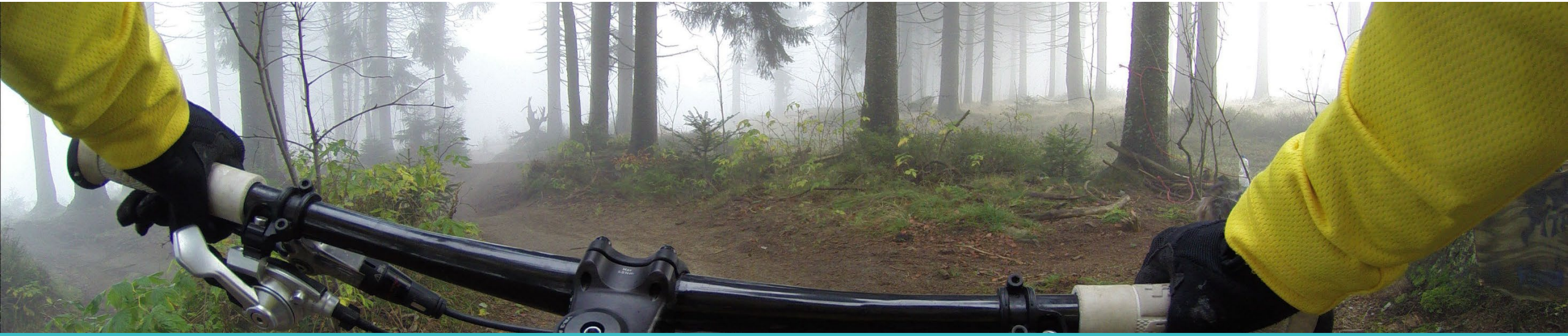
- Find yourself (use Amie if not found)
- Assign yourself/Amie as “Role Manager” for OVCR – Sponsored Programs

Learning Objective Review

01 Role Managers	02 Critical Roles	03 Identify Roles	04 Establish Roles
Role Managers Know the responsibilities and functions of Role Managers	**Critical Roles** Know the critical Research Contact Roles in Cayuse	**Identify Roles** Be able to identify Research Contact Role Assignments	**Establish Roles** Be able to establish Research Contact Roles

Contact Us

Let us know how we did: http://bit.ly/BAASICS-Eval



Sponsored Programs
Office of Research
University of California, Davis
https://research.ucdavis.edu/proposals-grants-contracts/spo/

Tel: +530 754 7958
Email: spotraining@ucdavis.edu

Kassie M. Obelleiro
Training Officer

04 Resources

Common Acronyms

- AB20: Assembly Bill 20
- AY: Academic Year
- BAA: Broad Agency Announcement
- BUA: Biological Use Approval
- BY: Budget Year
- CGA: Contracts and Grants Accounting
- COI: Conflict of Interest
- ERA: Electronic Research Administration
- F&A: Facilities & Administrative rates; also referred to as indirect cost rate (IDC or ICR) or “overhead”
- FOA: Funding Opportunity Announcement
- GMS: Grant Management System
- HASTOC: Human Anatomic Specimens and Tissue Oversight Committee
- IACUC: Institutional Animal Care and Use Committee
- IPF: Internal Processing Form
- IP: Intellectual Property
- IRB: Institutional Review Board
- PI: Principal Investigator
- RCI: Research Compliance and Integrity
- RCR: Responsible Conduct of Research
- RFA: Request for Applications
- RFP: Request for Proposals
- PHS: Public Health Service
- PRAM: Progress Report Additional Materials (NIH)
- PY: Project Year
- RPPR: Research Performance Progress Reports
- SBIR: Small Business Innovation Research
- SMR: Summer
- SNAP: Streamlined Non-Competing Award Process (NIH)
- SPO: Sponsored Programs unit in the Office of Research
- STTR: Small Business Technology Transfer

UC Davis – Cayuse Resources

- Cayuse SP Quick Reference
- Cayuse: Handbook for Role Managers
- Cayuse SP Role Delegation Authorization Form
- Cayuse SP Training Videos
- Handbook for Department Contract & Grant Staff, Principal Investigators and Approvers (For submission to SPO)
- School of Medicine Cayuse SP Guidelines (For submissions involving School of Medicine units or investigators)
- Handbook for Department Industry-Funded Clinical Trial Staff, Principal Investigators and Approvers (For submissions to the UCDH Contracts Clinical Trials Contracts Office.)

Sponsored Programs Contacts

- SPO Contact Us webpage: http://research.ucdavis.edu/contact-us/sponsored-programs/
- Proposals: proposals@ucdavis.edu
- Awards: awards@ucdavis.edu
- Subawards: subawards@ucdavis.edu
- Closeouts: closeouts@ucdavis.edu
- eRA Help: SPOeRAhelp@ucdavis.edu
- Cayuse Help Desk: ORCayuseHelp@ucdavis.edu
- Training: SPOTraining@ucdavis.edu

Office of Research Listservs

- C&G Listserv: https://lists.ucdavis.edu/sympa/info/ovcr-cg
- Other Office of Research Listservs: http://research.ucdavis.edu/resources/listserv-subscriptions/
  - Core Facilities Program
  - Digital Millennium Copyright Act (DMCA)
  - Funding
  - Institutional Review Board (IRB)
  - Research Compliance and Integrity (RCI)
  - Responsible Conduct of Research (RCR)
  - Research Unit Lists
- SPARK: https://lists.ucdavis.edu/sympa/subscribe/spark_i

UCDAVIS
SPONSORED PROGRAMS OFFICE

Research Administration Forum

FOURTH WEDNESDAY OF EACH MONTH
8:30 – 10:00 AM
ZOOM: HTTPS://ZOOM.US/J/958409717

No in-person meeting until further notice due to Coronavirus-19

2020

Forum for department research administrators to:

- **Ask questions** of campus research administration units
- **Provide feedback** regarding research administration services and processes
- **Hear updates from campus research administration units**, such as Contracts and Grants Accounting, Sponsored Programs, Research Compliance and Integrity, IRB Administration, IACUC and others

Subscribe to the C&G listerv for updates and reminders:
https://lists.ucdavis.edu/sympa/info/ovcr-cg

Additional meeting in April and May due to COVID-19

JANUARY

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FEBRUARY

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NOVEMBER

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DECEMBER

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27	28	29	30	31		

Research Administration Forum

Join us via Zoom the **fourth Wednesdays at 8:30 am**!

Watch previous forums on YouTube

Live and Recorded Learning Opportunities

SPO BAASICS

Budget, Application, Award and System Instruction for Comprehensive Skills (BAASICS) are training sessions designed to help contract and grant administrators at UC Davis build and hone their research administration skills.Learn more

Staff Development and Professional Services Classes

SPO offers classes in the Research Administration Certificate Series (RACS) and the eRA Train the Trainer certificate series.